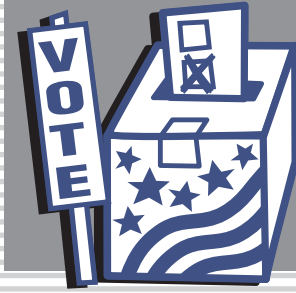


# **On the Campaign Trail**



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## The Buck Institute for Education

The Buck Institute for Education (BIE) is a not-for-profit (501c3) research and development organization working to make schools and classrooms more effective through the use of problem and project based instruction. Founded in 1987, BIE received permanent funding from the Leonard and Beryl Buck Trust, and receives funding for specific projects from foundations, schools, school districts, state educational agencies, and the federal government. BIE's current programs are organized around three objectives:

1. *Engaging Learners*: BIE offers problem based curriculum units for high school economics, government, and world history. The BIE *Project Based Learning Handbook* is used by teachers throughout the United States to plan, implement, and assess standards-focused projects that motivate students and enhance their learning.
2. *Supporting Teachers*: Professional development workshops in Problem Based High School Social Science and Project Based Learning (PBL) are given several times each year at the BIE offices in Novato, California. BIE also provides customized workshops on-site at schools and districts by request.
3. *Showing Results*: BIE extensively evaluates its curricular materials and training strategies to assess their impact on students and teachers, and to determine the conditions that facilitate and impede their effectiveness.

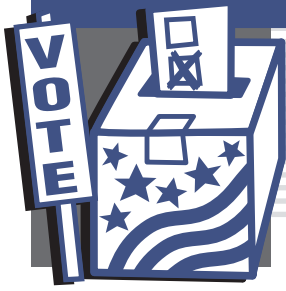
For further information, visit [www.bie.org](http://www.bie.org).

John Mergendoller, Ph.D.  
*Executive Director*

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# On the Campaign Trail

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# On the Campaign Trail

## Problem Statement



How can we, as campaign media consultants, create campaign literature so that we get the friend of our client, the governor, elected to office and the governor hires us for his next campaign?

## ★ Introduction

Using the problem based learning approach, students will explore how office seekers are marketed in our campaign process. They will also study how candidates, in order to get elected, often sacrifice attention to issues and participate instead in negative campaigning. At the end of this unit, students should be able to make educated value judgments about current campaign practices.

## ★ Purpose and Rationale

The purpose of this unit is to help students become educated political consumers. By working on a fictional State Assembly or County Board of Supervisors race, students use the marketing strategies common to political campaigns. As a result, students will be better able to critically evaluate candidates and campaign issues by separating the marketing from the substance. Students may find it difficult to participate in a process whereby candidates are “sold” to the public in a competitive arena. However, our leaders and policies are not chosen for us. Candidates compete for public approval—and therefore, for our votes. As voters, we must evaluate and debate competing beliefs, ideas, solutions, and candidates. It is a messy, often aggressive process, but it is democracy. In fact, representative democracy *requires* competition.

Students may find it difficult to confront, much less participate in, a process whereby candidates compromise their point of view on issues. But candidates must often compromise their favored stance in order to get elected. In fact, this is just the beginning. If elected, representatives are called upon to compromise with other representatives and come to some solution that a majority will accept. It cannot be overemphasized that representative democracy requires compromise, just as it requires competition. We want students to understand that candidates will often shift or entirely change their position on an issue in order to garner votes. It is up to the student, and the voters, to determine how much of that is acceptable political necessity and how much is a lack of vision and integrity.

Recognizing that there can be a disparity between who makes a good candidate and who makes a good officeholder is an important lesson in this unit. As such, it is important that students see how effective marketing strategies can often mask—or expose—a candidate's character flaws. Some of these flaws may or may not affect the candidate's ability to be an effective public servant. But, the message is: Voter beware.

## ★ Placement in Curriculum

This unit is designed to teach students about the campaign process. Prior to undertaking this unit, students should be familiar with the fundamental principles of democracy as expressed in the U.S. Constitution and other essential documents. These concepts can be taught using the Buck Institute for Education (BIE) “Problem Based Government” units. The BIE unit about enacting policy change (**LegiQuest**) and the unit on comparative forms of democracy (**A Government for Xlandia**) should precede **On the Campaign Trail**. Another BIE unit, **The Better Budget**, may also serve as a prerequisite, as it illustrates why politicians and

citizens disagree about public priorities. A complete listing of content standards associated with each unit can be found in the **Problem Based Government Overview**. The tables under *Content Standards* show the standards addressed by this unit.

## ★ Concepts Taught

*On the Campaign Trail is designed to teach the following concepts:*

- Candidate Image Building
- Campaign Issues
- Campaign Organization
- Campaign Strategy
- Media as a Campaign Tool
- Negative Campaigning
- Press Leaks
- Pseudo-Events
- Spin
- Voter Demographics

*Teachers can also cover the following concepts using this unit:*

- Campaign Funding
- Campaign Finance Reform
- Nominating Conventions
- Primaries
- Voter Turnout

## ★ Objectives

By participating in this unit, students will:

- Understand constituency profiles, candidate strengths and weaknesses, and resultant candidate marketing strategies
- Recognize that candidates respond to the perceived priorities of their constituents via their statements about campaign issues
- Identify the factors that build a positive image for a candidate
- Recognize the use of spin
- Identify candidate vulnerabilities and how they are addressed in a campaign
- Demonstrate an understanding of campaign organization
- Demonstrate an understanding of campaign strategy
- Recognize how the media are used in the campaign process
- Recognize that candidates are marketed to specific constituencies
- Understand that campaign consultants generally work for causes and candidates they favor
- Produce and critique appropriate and effective campaign literature
- Recognize that candidates and their staff make moral decisions that weigh attention to issues against personal characteristics
- Realize that the campaign process is subject to much debate
- Read, write, listen, and make oral presentations more effectively

## Content Standards

A democratic system requires that citizens participate in campaigns as staff, volunteers, candidates, and informed voters. Performing these functions requires a sound understanding of the campaign process and the controversies that surround campaigning. This content, which is central to **On the Campaign Trail**, addresses the following *National Standards for Civics and Government*, Center for Civic Education, 1994, for grades 9 through 12.

Standard	Concept	
I. A.	Definition and Purpose of Government	★
I. B.	Characteristics of Limited and Unlimited Government	
I. C.	Nature and Purposes of Constitutions	
I. D.	Alternative Constitutional Systems	
II. A.	U.S. Constitutional System	
II. B.	Distinctive American Characteristics	
II. C.	American Political Culture	★
II. D.	American Constitutional Values and Principles	★
III. A.	Constitutional Restraints: Shared and Limited Powers	
III. B.	Organization of the National Government	
III. C.	Organization of State and Local Governments	★
III. D.	The Rule of Law	
III. E.	Choice and Opportunity for Participation	✓
IV. A.	World Politics	
IV. B.	U.S. Relations with the World of Nations	
IV. C.	U.S. Influence in the World of Nations	
V. A.	Citizenship	
V. B.	Rights of Citizens	
V. C.	Responsibilities of Citizens	
V. D.	Civic Traits Needed to Improve Democracy	
V. E.	Civic Participation	★

✓ = a standard that is addressed with this curriculum

★ = a standard that could be addressed with this curriculum

**On the Campaign Trail** addresses the following *Curriculum Standards for Social Studies*, developed by the National Council for the Social Studies, 1994, for high school.

Standard	Concept
<b>VI.</b>	<b>POWER, AUTHORITY AND GOVERNANCE</b>
A.	Individual Rights, Roles, and Status
B.	The Purpose of Government
C.	Mechanisms Used to Balance Competing Needs and Wants *
D.	National Response to Conflicts
E.	Comparative Political Systems
F.	Conflict and Cooperation Among Nations
G.	Role of Technology in Conflict Resolution
H.	Applying Political Science Theories to Issues and Problems *
I.	Evaluating Government Achievement
J.	Preparing and Defending Public Policy Papers
<b>X.</b>	<b>CIVIC IDEALS AND PRACTICES</b>
A.	Key Democratic Republican Ideals
B.	Citizens' Rights and Responsibilities
C.	Evaluating Selected Public Issues *
D.	Forms of Civic Participation ✓
E.	Influence of Forms of Participation on Public Policy
F.	Public Policy Analysis and Political Actors *
G.	Impact of Public Opinion on Public Policy and Decision-Making *
H.	Relationship of Policy and Behavior to Democratic Ideals *
I.	Policy Statement and Action Plan for a Public Issue
J.	Participate in Activities for the Common Good

✓ = a standard that is addressed with this curriculum

\* = a standard that could be addressed with this curriculum

## ★ Time Required

7 days (45- to 60-minute periods)

## ★ Unit Overview

Through this unit students will learn firsthand how the media are used to market political candidates, and how campaign staff spin information to create a positive image for a candidate and a negative image for the opponent. By creating an image and marketing a candidate, students have an opportunity to critically analyze the pros and cons of using marketing strategies to get candidates elected. This unit can also serve as a launch for studying campaign reform in general and campaign finance reform specifically.

Students, working in teams, play the role of campaign media consultants. Each team must design a series of marketing pieces that address specific campaign issues for a less-than-perfect candidate. The candidate, through a twist in the problem, gets worse. As revealed in the twist, the candidate's opponent also presents the possibilities for negative campaign retaliation, and students must decide what spin to put on revelations about their candidate and their opponent. The unit concludes with a visual presentation of direct mail pieces, newspaper advertisements, and/or press releases that the consultant teams feel will salvage their candidate's campaign. This campaign literature serves as the evaluation portion of the problem.



## ★ Resources

Resources are distributed to the students at different points in the problem. (See *The Sequence of the Unit* for one example.)

**ALL HANDOUTS ARE  
LOCATED IN APPENDIX I**

Assessment guidelines for evaluating student performance on unit products can be found at [www.bie.org](http://www.bie.org). They include:

- A scoring guide for the table students complete to explain their spin on campaign issues
- A checklist for the description of the campaign message
- A scoring guide for the storyboard display of the profile mailer, issue magazine, hit piece, and press release
- A rubric for the final presentation of media pieces

## ★ Lesson Materials

Because problem based learning is grounded in constructivist learning, several “teachable moments” will arise when students readily see a need to know a particular concept. During these moments, teachers can use several techniques to teach concepts. For this purpose, lesson materials are included so traditional lectures can be used to provide information on more difficult subject matter. Alternatively, a Socratic method could be used in which the teacher uses questioning strategies to guide students toward knowledge and understanding.

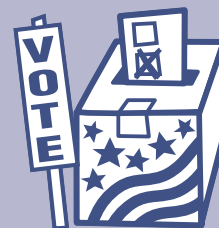
This unit on campaigning includes information on the following areas for potential mini-lectures:

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>■ Campaign Management           <ul style="list-style-type: none"> <li>– Staffing and structuring the campaign</li> <li>– Researching district issues, voters, and opposition candidates</li> <li>– Developing a campaign plan</li> <li>– Developing the message, image, and presentation of the campaign</li> <li>– Voter contact</li> <li>– Using paid and free media</li> <li>– Fundraising and budgeting</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>■ Campaigning in the United States</li> <li>■ Campaign Finance Reform</li> <li>■ Who Votes</li> <li>■ Campaign Slogans and Themes</li> <li>■ Using Direct Mail</li> <li>■ Characteristics of a Profile Mailer</li> <li>■ Characteristics of an Issue Piece/Magazine</li> <li>■ Characteristics of a Hit Piece</li> <li>■ An example of the completed table for “The Stand the Candidate Should Take on the Issues” (this is the teacher key in Appendix III)</li> </ul> |
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**LESSON MATERIALS ARE LOCATED IN APPENDIX II**

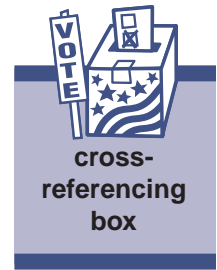
### **Resources Include:**

- Entry document
- Memo from Dario Martinez regarding J.T. Watts for County Board of Supervisors
- Memo from Dario Martinez regarding Angelina Gonzales for State Assembly
- Blank table for recording issues and the candidate’s stand on the issues
- Examples of profile mailers and issue pieces (on the BIE web site at [www.bie.org](http://www.bie.org))
- Memo from Dario Martinez and an attached note from the governor
- Examples of hit pieces (at [www.bie.org](http://www.bie.org))
- Description of a press release
- Sample of a press release
- Classroom textbook
- Web sites



## ★ The Sequence of the Unit

Because problem based learning is grounded in students' constructing knowledge from real-world applications, the sequence of learning will differ in each class. As a result, it is virtually impossible to describe the exact unfolding of this problem, even though it has been tested on several occasions. What follows is an example of the sequence of the problem during one class. We have used this particular sequence in our *Procedures* section. The phrases highlighted below are cross-referenced in the margin for easier detection.



- Discuss the memo from Governor Brown with the whole class
- Develop the initial problem statement with the whole class
- Develop the initial know and need to know lists with the whole class
- Undertake mini-lecture on campaign staffing with the whole class
- Divide students into two groups
- Half the class (Gonzales campaign) writes initial problem log entry
- Half the class (Watts campaign) discusses the memo from Dario Martinez
- Revise know/need to know lists with the Watts campaign
- Watts campaign writes initial problem log entry
- Gonzales campaign discusses the memo from Dario Martinez
- Revise know/need to know lists with the Gonzales campaign
- Have students prepare table explaining the spin they would give the campaign issues
- Optional: Undertake a mini-lecture on who votes
- Have students prepare a statement describing the message of the campaign
- Have students write second problem log entry
- With the whole class, undertake mini-lecture on why campaigns use direct mail
- Show examples and discuss the profile mailers and issue pieces
- Have students prepare and present a storyboard display of a profile mailer
- Have students begin preparation of an issue piece
- Discuss the memos from Dario Martinez and Governor Brown
- Revise know/need to know lists
- Show examples and discuss the characteristics of a hit piece
- Optional: Undertake a mini-lecture on press releases
- Finalize the problem statement with the whole class
- Have students make final problem log entry
- Have students prepare final series of media pieces
- Students present media pieces
- Use scoring guide to assess student products
- Wrap-up and debrief with the whole class

## ★ Procedure



memo from  
Governor  
Brown

### ENTRY POINT

Give students a copy of the memo from Governor Brown. This memo informs students that they are campaign consultants with expertise in campaign literature. They are asked to help with the campaign of a friend of the governor. The campaign manager, Dario Martinez, will contact them to explain the candidate, the district, and campaign issues and to give them a directive. The memo warns students that the candidate is “less than perfect.”

SEE ENTRY DOCUMENT, APPENDIX I



initial  
problem  
statement

### FRAMING OF THE PROBLEM

After discussing the entry document with the students, have them draft a tentative problem statement. Students should be prompted to start this process by filling specific information into the general problem statement form:

***How can we, as ?, do ?, so that ?***

The initial problem statement may be far from the problem statement presented at the beginning of this unit. This is expected. It is hoped that the problem statement will evolve as students gain more insight and knowledge about the problem and its underlying issues. Remember, the problem is intentionally ill-defined so that the students must grapple with issues and concepts. It is this continual struggle that builds knowledge. The initial statement may look something like:

***How can we, as the media team for LD Consulting, Inc., put together media pieces for the campaign of the governor’s friend so that the candidate wins the election and we are assured of employment?***

Remember, for now, it is fine to keep the problem statement ill-defined or off-target. The problem statement will become more refined, or perhaps change entirely, as the unit unfolds.



initial know/  
need to  
know

### KNOWLEDGE INVENTORY (KNOW/NEED TO KNOW)

After constructing the problem statement, the first step in answering the question is to assess what students know about the problem. This can be done as a class by creating a “What We Know” list on chart paper, an overhead transparency, or by using a computer projector. Ask students to carefully review the Entry Document and offer items for the list, making sure to *only record what is actually stated in the text, not what might be inferred*.

The next step in this process is to coach students to identify information they need to know in order to provide a solution to the problem statement. Again being careful that students pay close attention to all parts of the Entry Document, create a class list of “What We Need to Know”. If students are missing a key piece of information about the problem, the content, or their task, ask questions to elicit items for the list. Without a doubt, students will suggest things they need to know that, in reality, they do not need to know. Now is not the time to filter these questions out of the process. Rather, allow students to see their irrelevance once additional information is discovered.

The knowledge inventory will differ for each class because students are struggling with identifying the knowledge they have and defining the body of knowledge they do not have. An example of the type of items that might appear on the initial know/need to know list follows. *Remember that every class will produce a different list and every idea should be put on the board.* Sometimes the seemingly strange ideas that come from a know/need to know discussion result in some of the more creative approaches to the problem's solution.

## EXAMPLES OF INITIAL KNOW/NEED TO KNOW

### **What do we know?**

- Candidate is important to the governor
- Candidate isn't perfect
- Candidate has "good heart" and "a commitment to the community"
- We have worked for the governor in the past
- The governor is important to us
- If we do well, the governor wants us to work on other campaigns in the future
- The governor expects us to work around shortcomings of the candidate
- We will receive a review of major issues and demographics for the district
- We are working as a media team for LD Consulting, Inc.
- Dario Martinez is the campaign manager
- Our future work for the governor depends upon how well we do on this campaign

### **What do we need to know?**

- What office is the candidate running for?
- What are the candidate's flaws?
- How big is the district?
- Is money a factor?
- How much can we spend?
- What are the major issues?
- What kind of commitment does the candidate have to the community?
- What are the demographics of the district?
- What does "demographics" mean?
- What are media pieces, and what type of media pieces will we need?
- Can we slander anybody?
- Who are the opponents?
- Does our candidate have political experience?
- How much more time do we have in this campaign?
- What is the name of the candidate and his/her personal information?
- What is the candidate's relationship to the governor?

► **Potential Hurdle:** It's important to point out to students that although the motivating factor for working on this campaign is to keep the governor as a client, real-world campaign consultants respond to other motivations as well. Campaign consultants, if they are good, are well-paid and some of them act as "soldiers of fortune." Some consultants are motivated by power and money and will work for high-profile candidates that pay well. However, this is not the case for all campaign consultants. Most consultants get into the campaign business for idealistic political reasons—they believe government can solve social and economic problems, and they want to participate in making that happen. That is why consultants tend to work exclusively for either Democrats or Republicans or for causes that follow a particular set of beliefs. Liberal Democratic consultants will tend to work for liberal Democratic candidates and causes. Or, to use a specific example, Republican media strategist, Dan Schnur, has made a successful and lucrative career as a "gun for hire"—but he is a decidedly Republican gun for hire. He has worked for Republican candidates, term limits, and anti-affirmative action measures. The work consultants do is usually not divorced from their political beliefs. In fact, campaign consulting is a fascinating occupation, in part because it is made up of cunning strategists who are fundamentally true believers motivated by principles, beliefs, fame, ambition, power, and money.

## TEACHABLE MOMENTS AND DIALOGUES

Problem based learning is most effective when there is continual dialogue between the teacher (as a coach) and students. When students are left to discover knowledge or problem solutions on their own without teacher coaching, lectures, or use of problem logs, students may flounder or stray off-track. To prevent this, teachers must actively direct students toward the curriculum goals by posing probing questions in class discussions, providing lectures, circulating and listening to discussions in group work, and evaluating the problem log with meaningful, useful comments. Teachers may take advantage of teachable moments by giving mini-lectures using the lesson materials provided with this unit.

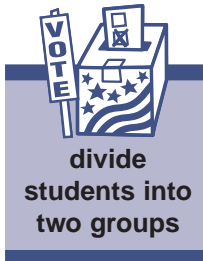


The lesson materials provided in Appendix II are meant for teachers to supplement their knowledge of the subject. It is not mandatory to use the lecture material. Much of this material can be used as needed or if questions arise that require a mini-lecture. The first mini-lecture in Appendix II is on campaign staffing and management and marketing strategies. Although this unit has students playing the part of a “media team” with specific expertise, they should be familiar with all aspects of the campaign process. The lesson materials about media strategies can help students to interpret the campaign issues in a way that puts their candidate in a favorable light. The lesson materials can be used as a

mini-lecture along with a PowerPoint presentation for students. A sample PowerPoint presentation is available at [www.bie.org](http://www.bie.org).

### LESSON MATERIALS FOR MINI-LECTURES ARE LOCATED IN APPENDIX II

## RESEARCH AND RESOURCES



Begin by dividing the class in half. Further divide one-half of the class into teams of three to four students to work on the Watts campaign. Divide the other half of the class into teams of three to four to work on the Gonzales campaign. The Gonzales campaign teams work on the problem log, while the teacher meets with the Watts campaign teams.

The first resources students receive are two memos from the campaign manager, Dario Martinez. One memo describes J.T. Watts, who is running against Mike Johnston for the County Board of Supervisors. The second memo describes Angelina Gonzales, who is running against Aldo Billings for State Assembly. These memos should be discussed separately with the student teams.

### ALL HANDOUTS ARE LOCATED IN APPENDIX I

## THE PROBLEM LOG

Throughout the problem, each student will keep a problem log which will help the student and teacher follow construction of the student’s knowledge. To ensure that students stay focused on the underlying political issues, and understand the content, the log should be checked periodically by the teacher. The log can also serve as an important assessment of how a student or group uses problem-solving skills, develops new questions or “need to know” items, and how well a group works together and manages time and tasks.

The problem log can be introduced after the class is familiar with the role they are playing in the problem. Students can keep track of the problem right from the start by recording in their logs the problem statement and know/need to know list, and then noting any later changes in these.



**initial problem  
log entry  
(Gonzales  
campaign)**

Introduce the problem log to the students working on the Gonzales campaign, while the Watts teams read the memo from Dario Martinez and revise the initial know/need to know. Ask the Gonzales teams to start their problem log by brainstorming what they believe to be the most important characteristics of an ideal candidate. The entry



**memo from  
Dario Martinez  
(Watts  
campaign)**

document warns them that their candidate is “less than perfect.” Have students list the qualities of a perfect candidate. Students should be prepared to defend the characteristics they have identified. Students can then list what tasks they think a candidate must perform when running for office. Finally, students, working in groups, can discuss how the qualities of a perfect candidate relate to the work of campaigning. Students should keep their problem log lists for their perfect candidate, as they will be using these lists to prepare the profile mailer for Gonzales.

► **Potential Questions to Ask:** The entry document warns that your candidate is “less than perfect.” What qualities would you want in a “perfect” candidate? What do you think are the most important tasks a candidate must perform when running for office? How do the qualities of a perfect candidate relate to the work of campaigning?



**revise know/  
need to know  
(Watts  
campaign)**

Take the half of the class working on the Watts campaign through the memo about Watts, his opponent, district issues, and constituents.

The new information from the Martinez memo gives cause to revisit the know/need to know list. Remember, you want to eliminate as much of the original need to know list as possible. Examples of what might be added to the know/need to know list include:

### ***What else do we know?***

- Our candidate is J. T. Watts
- He is running against Mike Johnston
- Johnston and Watts are running for the County Board of Supervisors
- Watts is a businessman in his early forties
- He likes sports
- He thinks the bureaucracy is inefficient and unresponsive
- He is a fiscal and social conservative
- He has not served in an elected office before
- He wants more jobs and activities for young people in the community
- Major issues are commercial development, highway construction, and increased crime
- Young families are moving into the community

### ***What else do we need to know?***

- What is a fiscal and social conservative?
- How much money do we have to spend on his campaign?
- What is a profile mailer?
- What is an issue piece?





**initial problem  
log entry  
(Watts  
campaign)**

Now give the problem log to the students on the Watts campaign teams, while you work with the Gonzales campaign teams on the memo from Dario Martinez and the initial know/need to know.



**memo from  
Dario Martinez  
(Gonzales  
campaign)**

Take the Gonzales campaign teams through the memo from Dario Martinez about the Gonzales and Billings campaign for State Assembly.



**revise know/  
need to know  
(Gonzales  
campaign)**

Follow the same procedure used with the Watts campaign, and revise the list of know/need to know. Eliminate as much of the original need to know list as possible.



**prepare  
table**

Martinez has directed the media team to explain the stand the candidate should take on the major campaign issues, given the demographics of the area. Students can gather the information they need from the candidate biographies, the review of major campaign issues, and the district demographic data. This exercise is intended to help students synthesize information from disparate sources. It also demonstrates how campaign staffs often are forced to use incomplete information to draw conclusions about the best course for a campaign. Remind students that data are never complete, and as campaign experts they are expected to suggest the most reasonable answers, given the information they have.

Have students fill in the table explaining the community's likely stance on issues, the candidate's stance, and the spin the media team would give the major campaign issues. They can begin by listing the major issues, the community's points of view about the issues, and the community groups who would likely support these different points of view. As an example, Gonzales is running in a predominantly aging district with deteriorating schools. If the candidate supports increased taxes to improve education, who is likely to vote for her, and who is likely to vote against her? Judging from what the students know about the candidate and the opponent, they can make educated guesses about which side of the issue their candidate would likely support. Gonzales would likely support improving the schools. Can she afford this stance if it means advocating higher taxes? Students have to weigh their candidate's likely point of view against that of the majority of voters and decide if the candidate can afford to promote that point of view.

If you wish, you can give students more specific information about the district's demographics or issues. Feel free to add details, change demographics, or create new issues or problems for the district. The conditions of the district can be as specific as you care to make them so long as there are conflicts among constituent groups and there are unresolved problems and issues requiring the candidates to take a stand. A blank table is included with the student handouts in Appendix I.



**optional:  
mini-lecture  
on who votes**

Teachers can have students fill out the first four columns of the table (Major Issues, Community Groups in Favor, Community Groups Opposed, and Candidate's Likely Stance Based on Biography). The process can be stopped here for a mini-lecture on who votes. Students can then fill in the last column (Stand You Think the Candidate Should Take to Win the Election).

A mini-lecture on who votes is included in Appendix II. Remind students that a campaign staff makes decisions about who to target with its message based upon who is most likely to vote. As an example, young people have a poor voting record, and as a result, candidates usually do not "market" to the young.

► **Potential Hurdle:** The underlying message here is that candidates can choose to take the point of view of the most voters, counter the point of view of the most voters and thus lose support, or spin the issue in such a way that their stand seems to fit the point of view of most voters. It's also possible to spin it so the candidate seems to support both sides (e.g., improved schools at no cost to taxpayers). Candidates often depend upon this type of rhetorical vagueness to skirt around issues that polarize a community. In addition to avoiding candor or direct responses, candidates will likely avoid extreme positions as well. As Barry Goldwater's aggressive stance toward local command of nuclear weapons in Viet Nam proved in the 1964 presidential race, politicians who go to extremes often lose to those who take less extreme stances and employ vague rhetoric about the stances they do take. After Lyndon Johnson won the 1964 election and began bombing the Ho Chi Minh Trail, pundits claimed, "We voted for Johnson and got Goldwater." The willingness of students to use these types of campaigning ploys and make the kinds of compromises demanded of candidates will run the gamut. Some students will embrace the opportunity to spin issues, use rhetoric, and ignore the values of the candidate. Others will want their candidate to stick by his or her values, even at the expense of votes.

Remind students that campaigning is a series of moral judgments and so is leadership. In the political arena, compromise is inevitable and it is the essence of a democratic system. In a free market of ideas, people are bound to disagree. The democratic process provides a framework whereby people with conflicting needs and wants can come to some compromise. Such compromise can result in a reasonable amalgam of ideas that the electorate can live with. Campaigning is the *beginning* of an elected official's experience with political compromise.

One example of a completed version of the table is included as a teacher key in Appendix III. This example can be used to prompt students during the exercise, but it should not be used by students to copy down the information. There are many other ways this table could be completed, and the teacher key simply serves as an example for teachers.



### TEACHER KEY IS LOCATED IN APPENDIX III

The second thing Martinez has asked the media team to do is prepare a statement describing the message of the campaign. This can be done as homework and presented by the media teams to the class. Alternatively, some answers can be presented in class with the remaining answers submitted to the teacher. The statement should answer the following questions:

**1) What issues will the candidate focus on in the campaign?**

Students can use the information they prepared for the table to answer this question.

**2) What slogan will the candidate use?**

Slogans are one-line quips that can be easily remembered and are directly associated with a candidate or in some way describe a candidate. (For examples of slogans, see Appendix II.)

**3) What recurring theme will the candidate use about his/her campaign?**

Themes differ from slogans in that they are associated with issues, or the general focus of the campaign, rather than directly relating to the candidate. (For examples of recurring themes, see Appendix II.)

**4) What recurring theme will the candidate use about his/her opponent?**

These themes are generally negative and short and are often aimed directly at the opposing candidate. (For examples of recurring themes used about an opponent, see Appendix II.)

**5) Why have you chosen this strategy?**

Students should work in their groups to devise a defense of their strategy.

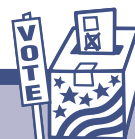




second  
problem log  
entry

Perhaps the most important use of the problem log in this unit is as a check for the students' feelings about the campaign process. Students should be asked to note any difficulty they have in preparing a campaign theme and message for someone they do not necessarily support, or for someone willing to make compromises about important community issues. It is important that teachers check logs at this stage to address problems. Students should note how they think the campaign process can be improved, and should consider why campaigning is such a crucial element of a democracy.

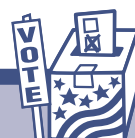
► **Potential Questions to Ask:** As a free market society, we accept and often rely on advertising to tell us about the products we buy. We often use advertisements to inform or educate us about certain products. In politics, consumers, in the form of voters, select candidates in a similar manner—that is, advertisements inform or educate us about the candidates. However, using advertising in politics can “turn people off” to politics and make them cynical about candidates. Why do you think advertising candidates turns people off to politics? Do you think it is wrong for politicians to advertise themselves when running for office, and if so, why? If campaigning is a necessary element of democracy, how do you think it can be improved?



mini-lecture  
on why  
campaigns  
use direct mail

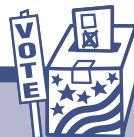
Martinez's final request is for a storyboard display of a profile mailer and an issue piece. You can begin this part of the unit by undertaking a mini-lecture with the whole class on why campaigns use direct mail. A mini-lecture on direct mail is included in Appendix II.

It is also helpful to review the characteristics of a profile mailer and issue piece and to show students examples. Appendix II includes a mini-lecture on the characteristics of profile mailers and issue pieces. Examples can be found at [www.bie.org](http://www.bie.org).



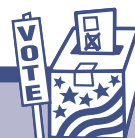
show  
examples  
and discuss

Once students have reviewed the examples, they can begin designing their profile mailer. Have students begin this process by reading their initial problem log entry in which they listed the qualities of a perfect candidate. Have students identify qualities from this list that are characteristic of their candidate. These are the qualities they should highlight in the profile mailer.



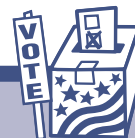
storyboard  
display of a  
profile mailer

The profile mailer should be done on a storyboard with each section of the board depicting one fold or panel of the flyer. Profile mailers can be displayed in the classroom, and students can present their storyboard to the class for comment. Scoring guides for assessing the profile mailers are available at [www.bie.org](http://www.bie.org).



begin  
preparation of  
an issue piece

After presenting and assessing their profile mailers, students begin work on the issue piece. It is their work on the issue piece that is interrupted by the problem twist. Wait until after the students have invested time and creative energy in the issue piece—when they have a vested interest in its completion—to introduce the memo from Martinez with the governor's attached note.



memos

While students are involved in creating their issue pieces, they receive a memo from Martinez with an attached note from the governor. This is the twist to the problem. Students discover that their candidate has been involved in a situation that may affect his or her ability to retain voter support. The media teams are now asked to make a decision about how to use the remaining scarce time and financial resources to shore up the campaign against an attack ad from the opponent. The media teams must decide

whether to continue with the flyer they have been working on, or to create a flyer that is a hit piece against the opponent. Another possibility is to write a press release and/or newspaper advertisement putting a positive spin on the situation.

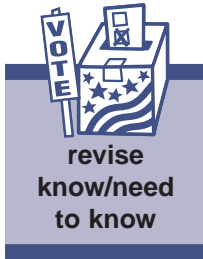
Explain to students that they cannot use the issue piece to defend their candidate against the hit piece, and they cannot incorporate hit piece wording aimed at their opponent in their issue piece. Experience with this

unit tells us that the Watts campaign is more likely to use hit pieces than the Gonzales campaign because of the seriousness of the hit. However, make it clear to students that the choice of pieces is theirs, provided they recognize the advantages and disadvantages of each option.

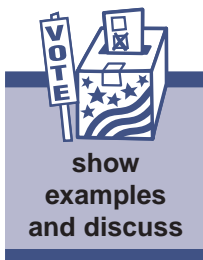
► **Potential Hurdle:** The students were told in the entry document that their ability to do an effective job on this campaign would affect the governor's decision to hire them for another campaign. However, in the governor's most recent communication he is, in a thinly veiled way, taking part of the responsibility for this last-minute campaign disaster. This exonerates the media team enough so they can make calculated decisions about what to do next. They do not need to simply react by sending out a hit piece about the opponent. Make sure the students recognize that they have choices.

However, remind students that to voters an unanswered hit is a concession. Good intentions may lead students to stick to the high road at all costs, but they need to recognize the efficacy of negative

campaigning and the toll it takes on the target—their candidate. They must weigh their ideals about positive campaigning against the odds of sacrificing their candidate's victory.



This is the time to take inventory of what students will need to know in order to proceed with the final presentation for the campaign. Students will likely include in their need to know lists questions about hit pieces and negative campaigning in general. Students may also need information about how to write a press release.



Review with students the characteristics of a hit piece. A mini-lecture on hit pieces is included in Appendix II. Remind students that they cannot compromise this dilemma by adding elements of the hit piece into their issue magazine. Hit pieces and issue magazines present the campaign issues in completely different ways. Issue magazines promote a positive view of the candidate's work on several issues and give detailed personal information about the candidate, while hit pieces condemn the opponent's personal behavior or stand on an issue.

Problem based learning involves making tough decisions, and avoiding this decision-making compromises the lesson about campaigning. Because of dramatic changes that can take place during a campaign, it is common for staff to be asked to abandon a project and move in an entirely new direction. This is what students are facing at this juncture in the unit.



Show students the examples of hit pieces from the BIE web site. Be sure to ask students what they find effective and ineffective about these direct mail pieces. Ask them to point out what they think appeals to the voters and what will likely turn voters off. Appendix II includes references to web sites with information on negative campaign advertising and its impact on voters.

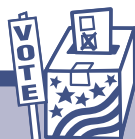
Appendix II includes a mini-lecture and an example of a press release. (Students who have participated in the BIE Economics unit, **Matildaville**, will already be familiar with the press release. Composing a press release is one of the requirements for that unit.)

► **Potential Hurdle:** Be careful not to overemphasize the value of the press release at this juncture. A press release before, during, and after the impact of the opponent's hit piece can be used. They are free and they help frame your candidate's side of the argument. However, they are not going to take much of the sting out of the attack. Press releases allow the campaign to inform reporters as to the candidate's whereabouts; they can provide quick, universal responses to hits; and they can offer reporters ideas about stories to pursue. They will not serve as stories in and of themselves. No news agency is going to tell the story exactly as it is contained in the press release. Also, there is no guarantee that the press release will even be used or noticed by the press. And worst of all, the press release can lead reporters to negative stories the candidate doesn't want told.



**finalize the  
problem  
statement**

Once the class has reviewed the examples of hit pieces and the example of a press release, they should be told that they will not receive any additional information on the need to know list. The problem statement should be revisited for the final time.



**final problem  
log entry**

The final problem log can be used after students in their media teams have had an opportunity to discuss their options.

► **Potential Questions to Ask:** What are the various scenarios you can use to help save your candidate's campaign? What are the pros and cons of each?



**prepare final  
series of  
media pieces**

At this point, direct the media teams to design and prepare their final presentation of campaign materials.



**present  
media pieces**

## EXIT FROM THE PROBLEM

Students, in their groups, are asked to prepare a presentation of their media pieces for Martinez. They are required to have visuals (e.g., storyboard of hit pieces and issue pieces, examples of a press release). Remember that part of the skill-building in this unit is to prepare a convincing presentation. Visuals should be turned in to the teacher before the presentation so that errors can be shown to students and corrected. Teachers should

stress that *all* members of the group must be prepared to make the presentation or to answer questions. One way to ensure this is to randomly select, at the time of the presentations, the member of the group who will make the presentation. Students can also be asked to attach a sheet to the final media pieces, explaining the reasons for their choices and who the pieces target.



**scoring  
guide**

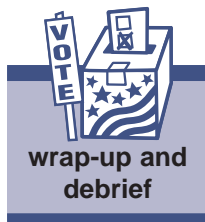
Teachers may want to collect and save samples of student campaign mailers, newspaper ads, and press releases to show subsequent classes as examples.

A scoring guide is provided at [www.bie.org](http://www.bie.org) for assessing the presentations. It can also be used to guide students in meeting the expectations of the assignment.

When assessing students, remember that problem based learning is most effective when the students are placed in real-life situations. As a consequence, if students begin to alter the authenticity of the situation, the learning environment can easily be reduced to fun

and games. This negates much of the validity of the technique and knowledge gained from the unit. To prevent this digression, stress that their work must be accurate and reflect knowledge gathered from available resources. In other words, students cannot make up data and scenarios. They cannot give bogus answers to real situations.

Also, coach students to see that "I don't know" is a legitimate answer to a question. This makes the classroom authentic. When presented with a problem outside the classroom, information is generally available, but time to seek out resources is limited. This is one of the lessons that problem based learning teaches. To enable students to gain this insight, they must learn when to say that they do not have the data to give an appropriate, accurate answer. In other words, there are a limited number of answers because of limited information. *Again, students cannot make up answers. They must use the available information.*



## WRAP-UP AND DEBRIEFING

It is critical that the wrap-up and debriefing section of the unit not be ignored. This is the part of the unit in which students, as a class, are given feedback on both process and content. *It is imperative that incorrect knowledge or statements be corrected at this point in the problem.* How the debriefing is conducted is less important than the fact that it is conducted.

### **Process Debriefing**

It is important that students have a chance to discuss how they undertook the problem-solving process. This could be done with a series of questions. For example:

- How do you think you did?
- Is there anything you think you left out?
- Is it difficult when there is not one right answer to the problem?
- How does it feel to go through the problem without specific direction?

These questions could be used to help guide the students toward a discussion about how the process helped them learn about campaigning.

### **Content Debriefing**

As mentioned in the *Purpose and Rationale* section, there can be a disparity between who makes a good candidate and who makes a good officeholder. Recognizing this disparity is an important lesson in this unit. Through this problem students see how effective marketing strategies can often mask—or expose—a candidate's character flaws. It is up to the voters to determine if these flaws will affect the candidate's ability to be an effective officeholder. This is why it is crucial for voters to observe campaigns with a critical eye. It is important to discuss these ideas with students at the end of the process. Some questions to bring up include:

- Should we curb negative campaigning, and if so, how?
- Do our frequent (almost constant) elections create voter burnout, and if so, how can we avoid this?
- Will campaign finance reform improve campaigning?
- How has participating in this experience made you a better judge of candidates?
- How did you feel about having to consider abandoning the issue magazine before it was completed?

## ★ Do's and Don'ts

In reading through this problem, changes will inevitably come to mind. In this section, we highlight changes that have worked and changes that have not worked. Please do not try the ideas that have failed, even though the temptation may be great!

### ***Ideas to Try***

Teachers can add other candidates and offices to the choices presented here. In considering other candidates keep in mind the need for a “twist” or some revelation that makes the candidates less than perfect and opens them up to hit pieces. Although it presents classroom management challenges, teachers can divide students among the four candidates profiled in this unit (J.T. Watts, Mike Johnston, Aldo Billings, Angelina Gonzales) and run four separate campaigns instead of two. This would provide an opportunity to end the unit with a candidate debate. Also, running candidates against one another creates in-class competition that may give some students more buy-in.

Students may want more detail about the candidates' districts. Feel free to change the demographics, add elements to the issues or community problems, or create districts that mirror the students' community. The specifics of the communities can be as rich and varied as you wish, provided you maintain conflicts among constituent groups and create community problems (e.g., traffic congestion or declining test scores).

This unit works well with cross-curriculum English or Philosophy courses. If time permits you may want to ask students to prepare other campaign materials, including bumper stickers, billboards, street or “lawn” signs, radio ads, or give-away items.

### ***Ideas Not to Try***

Campaigns should be kept local or for statewide legislative offices rather than national or governor's races. At the national or governor's level, campaign funding, staff size, and the number of consultants drastically limits the ability of a group like the “media team” to make meaningful decisions. In addition, governor and congressional races vary in terms of funding, and therefore, in types of media attention. A Senate campaign in Montana, with a population of about 902,000, is considerably different in cost and in the size of its media market than a Senate campaign in New York with a population of about 19 million, or California, with a population of more than 33 million. Students should not be given the impression that they can generalize about governor or congressional campaigns based upon campaigns conducted in their state or district. In addition, at these higher levels of campaigning, there is a heavier reliance on television advertisement. Generally, at the local level (except in major cities) there are radio but not television advertisements. Asking students to prepare a television commercial for a candidate is probably not a realistic assignment. Television commercials are labor- and funding-intensive and require sophisticated knowledge of the technology and the medium.

For further information on the pros and cons of television and direct mail campaigning, see the article, “TV vs. Direct Mail: Campaign Cost Comparison” from *Campaigns & Elections*, published by Congressional Quarterly. The article is included in the supplementary materials for this unit.

Also see the following web sites for timely articles about and examples of television campaign commercials:

[http://www.uiowa.edu/~commstud/resources/pol\\_ads.html](http://www.uiowa.edu/~commstud/resources/pol_ads.html)

[http://www.pbs.org/30secondcandidate/tricks\\_of\\_the\\_trade/](http://www.pbs.org/30secondcandidate/tricks_of_the_trade/)



## **Appendix I:**

# **Student Handouts**



## FROM THE DESK OF GOVERNOR BROWN

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FROM: Governor Brown  
TO: Media Team, LD Consulting, Inc.  
RE: Upcoming Campaign

As you know, a long-time friend of mine is running for office in your area. I have recommended to my friend's campaign manager, Dario Martinez, that he talk to you about putting together media pieces for the campaign. I explained to Martinez that I was very much impressed with the work you did for me in the last election. Part of my commitment to working with you in the future includes my desire to have you help out on the campaigns of candidates important to me. This candidate is very important to me.

Martinez will be sending you a brief profile of my friend, a review of the major issues, and the demographics of the district. He'll want to know what you have in mind for the campaign's message and look.

You'll discover soon enough that my friend is a less-than-perfect candidate. However, I expect that, given your track record, you will find this to be a healthy challenge and not a stumbling block. This candidate has a good heart and a genuine commitment to the community. I hope the campaign will be an exciting opportunity for you.

Go to it. As always, I expect only the best from you.



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# J. T. Watts for County Board of Supervisors

## C A M P A I G N   H E A D Q U A R T E R S

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FROM: Dario Martinez, Campaign Manager

TO: Media Team, LD Consulting, Inc.

We are looking forward to your presentation of media pieces for J.T.'s campaign. Following are the important facts of the campaign, including a profile of J.T. and his opponent, and a review of the campaign issues and district demographics.

### **J.T. Watts, Supervisor Candidate**

Although J.T. graduated from law school with honors, he has never practiced law. After college he began a private investigation business specializing in technology tools for surveillance. He has been operating this business locally for 10 years, and he has seven employees. J.T. is not married and has no children. He has an elderly mother and aunt, both of whom he supports. J.T. is a political novice. However, he has been involved with public service projects. He has served on several nonprofit boards and is active in youth athletic programs. As a member of the Park and Recreation Board, J.T. was successful in bringing a skateboard park and outdoor basketball courts to the community. (He played basketball in college.) Most recently J.T. led a campaign to build a business park in town. He and a group of business partners actively, and successfully, pursued funding for the project. They shepherded the project through the planning phase and ultimately succeeded in getting the business park built. It was this often frustrating interaction with local government that influenced him to run for public office. He found the bureaucratic process inefficient and unresponsive to citizens. J.T. recognizes that he is a fiscal and social conservative running in a county that does not support the social conservative agenda. Although he has no background in elected office, he feels he brings a businessman's common sense to politics. He is committed to making government more responsive to the needs of citizens. He wants to improve government institutions so they will help the community prosper in a reasonable and prudent manner. J.T. feels that sound planning and commercial development will bring much-needed jobs to the community, which in turn, will help young families and students. He wants more jobs, training programs, and constructive activities for young people. He believes people will not need welfare and public handouts if they have the opportunity to work at good-paying jobs. J.T. is articulate, upbeat, and highly energetic. His youthful good looks belie the fact that he is in his mid-thirties.

### **Mike Johnston, Supervisor Opponent**

Mike Johnston is a 71-year-old retired police officer who served as president of the local police union for more than 20 years. Johnston served on the City Council in the biggest city in the county before running for county supervisor. No one in the county knows local law and local politics better than Johnston. It's long been believed that to get anything done, one had to get the approval



of Johnston. Here is where Watts and Johnston first locked horns. Johnston objected to converting open space into a business park. Watts' overwhelming success at raising funds for the project and the sheer numbers he had supporting the business park embarrassed Johnston into accepting the project. Johnston has carried a fierce grudge against Watts ever since. He sees Watts as the "new breed" of arrogant business leaders who try to use end-runs to get around the county's old guard political elite. Johnston is well-connected among the state's "checkbook Democrats." He is interested in running for the Board of Supervisors as a means of protecting the county from wholesale development and protecting the interests of long-term county residents. Johnston is especially concerned about the elderly residents of the county who raised their children in the community and want to remain there in their retirement but are fearful of the effects of wholesale commercial development.

## **Major Campaign Issues**

### ***Commercial Development***

Several "big box" retail outlets want to move into the county. The building of a series of big box stores and shopping outlets is supported by pro-growth forces who see new tax revenues coming into the area as a result of these businesses. Increased tax revenues will help fund much-needed community projects. Supporters also see these stores as providing jobs for working and middle class residents of the area. The anti-growth forces see the stores as bringing in more people and creating traffic congestion. They think the increased tax dollars would be spent on fighting increased crime, road building and maintenance, and other "unnecessary" public services. Opponents also worry that big box stores will destroy some of the locally owned businesses competing with them.

### ***Local Highway Construction***

The state has offered to fund widening of the highway that runs through the district, provided local residents fund a portion of the project through a tax. Thus far, county voters have refused the freeway plans. Supporters of the highway construction plan see this as solving some nightmarish traffic problems in the area. They are concerned about declining property values as a result of the difficult commute to the major metropolitan area. Opponents see this as more taxes. They also think that increased access to the area would lead to more commercial and residential development and eventually more traffic problems.

### ***Increased Crime Rate***

Local residents are concerned about the increase in gang-related crimes in the area. Some local youth agencies and parent groups want to curb gang activity and youth crime by providing more activities for young people. They want intervention programs; after-school, evening, and weekend supervised activities; and inexpensive family activity centers and recreational facilities. Others in the community see this as a crime control issue. They want increased police protection, more officers on the streets and in the schools, and stiffer sentences for convicted criminals.

### **District Demographics**

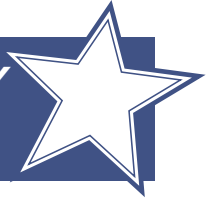
This is predominantly a commuter community for people who work in the major metropolitan area about a half-hour's drive out of the county. Housing is still affordable because of the difficult commute, and a lot of young families are moving here. The ethnic makeup of the community is a close replica of the state as a whole, with a growing number of middle and working class Asians, African Americans, and Hispanics. Many of the citizens of the county have lived here all their lives, and they resent the influx of people from the nearby metropolitan area. Housing developments are replacing open fields, orchards are becoming strip malls, and schools are overcrowded. It is becoming difficult to find teachers and people to fill skilled government jobs, as salaries for public employees are lower here than in the nearby metropolitan area.

**Now that you have read about the candidate and the district, we would like you to start work on the campaign by completing the following tasks:**

- Please complete the attached table, which will tell us the stand you think the candidate should take on the issues.
- Once you have completed the table, please write a statement describing your campaign message. Your statement should answer the following questions:
  - 1) What issues will the candidate focus on in the campaign?
  - 2) What slogan will the candidate use?
  - 3) What recurring theme will the candidate use about himself?
  - 4) What recurring theme will the candidate use about his opponent?
  - 5) Why have you chosen this strategy?
- We would like you to design the “look” for a series of direct mail pieces, including an introductory or profile mailer and an issue piece. Please prepare the initial profile mailer and the issue piece as a storyboard display.

# ANGELINA GONZALES FOR STATE ASSEMBLY

## C A M P A I G N H E A D Q U A R T E R S



FROM: Dario Martinez, Campaign Manager  
TO: Media Team, LD Consulting, Inc.

We are looking forward to your presentation of media pieces for Angelina's campaign. Here are the important facts of the campaign, something about Angelina and her opponent, and the campaign issues and district demographics.

### **Angelina Gonzales, Assembly Candidate**

Angelina is a friend of Hillary Clinton and mirrors her liberal views about the role of government in providing a safety net for those less fortunate. They share similar political philosophies about the need for government protection of the elderly, poor, children, and those unable to care for themselves. Although Angelina attended private schools all the way through law school, she supports access to quality public education and the raising of taxes to support schools. She thinks making the state's schools the best in the nation should be a high priority. She prides herself on being a champion of the working poor. She wants to protect the beautiful natural environment of this district, keep the small town flavor, and make it a welcome place for tourists. As a successful criminal defense attorney, Angelina is a champion of prison reform and fair treatment of the poor and minority groups who are disproportionately imprisoned. She advocates protecting the rights of the accused, rehabilitation programs for convicted criminals, and prison alternative programs for non-violent offenders. Angelina has served on the local school board, the City Council, and the statewide Governor's Committee to Investigate Campaign Finance Reform. Angelina is 35 years old, married to a local businessman, and has two young sons. She is running for office in order to help enact her vision of government involvement in social reform. Because of her background as a defense attorney, Angelina is accustomed to speaking and presenting complicated information in an understandable and convincing manner. She is smart, charming, attractive, and well-spoken. Most of all she believes that government, managed by ethical politicians, can be an effective champion of the people.

### **Aldo Billings, Assembly Opponent**

Aldo Billings is a 35-year-old African American political conservative and one of the state's most promising young businessmen. He is proud of his "up-by-the-bootstraps" success story. He is, as Richard Nixon would say, a "cloth coat" Republican. Billings is the son of a single mother—a schoolteacher who insisted that her son attend public schools, including state college. After receiving a BA in business, Billings went to work for an international shipping company. He eventually started his own business and has made a fortune in the leasing of shipping containers for international transport. His company employs a fair share of the local white-collar workers. Not known for his generosity, Billings is a stern man, economically conservative, practical, and politically ambitious. Billings is well-connected nationally in the Republican Party and sees this Assembly race as a first step to running for national office. Billings is committed to bringing sound economic and fiscal thinking to government. He thinks the state government can be an effective tool in serving economic growth, protecting citizens, and offering education opportunities for its citizens—provided government follows a careful and realistic plan. Billings feels that government as it is now is bloated with costly programs that burden middle class taxpayers. These programs have made the poor dependent upon government handouts instead of teaching them to do for themselves. Billings is also an outspoken critic of "pork barrel politics" and thinks it is time for working people to speak out against unbridled public spending. He wants to be the people's representative in this fight.

## Major Campaign Issues

### *Campaign Reform*

People in this community are sick of negative campaigning and the “obscene” amount of money that goes into the funding of local and state campaigns. They want their local elections to focus on issues and not personalities. They resent outsiders trying to influence their elections.

### *Taxes*

State taxes are an issue for both the elderly and working classes in this area. There is general agreement that the state tax system negatively affects the middle class. Most people want lower taxes. Debate at the state level about increasing services by increasing taxes is an extremely unpopular option in this community. These people don’t want increased taxes. They would rather have government services cut than taxes raised, but they disagree on the services they want cut.

### *Education and Social Services*

Test scores in the area are mid-range to low compared to the rest of the state, and school buildings are deteriorating. The school-age population is rising. However, the elderly control local political decisions, and they see no immediate personal gain from supporting higher taxes for public education. The aging population wants the kinds of public services that benefit them: police protection; increased jail time for convicted criminals; affordable health care and prescription drugs; more assisted-living facilities; and a readily available, inexpensive, semiskilled workforce. Young families want better schools and recreational facilities and a safety net for those who lose their jobs.

## District Demographics

This community is highly suspicious of the liberal agenda and is one of the few areas of conservative voting in the state. The elderly — specifically aging members of the Eisenhower Generation and the eldest and most affluent of the Baby Boomers — dominate politics. Housing is still moderately priced and golf courses and other recreational facilities are plentiful. Education is not a high priority and several school bonds have been defeated in recent years. There is no heavy industry in the area. However, young families come here because they can find work in tourist and recreational facilities, the state hospital, homes and assisted-living facilities for the elderly, and in a growing small technologies industry. A large software company is considering moving its headquarters here.

### **Now that you have read about the candidate and the district, we would like you to start work on the campaign by completing the following tasks:**

- Please complete the attached table, which will tell us the stand you think the candidate should take on the issues.
- Once you have completed the table, please write a statement describing your campaign message. Your statement should answer the following questions:
  - 1) What issues will the candidate focus on in the campaign?
  - 2) What slogan will the candidate use?
  - 3) What recurring theme will the candidate use about herself?
  - 4) What recurring theme will the candidate use about her opponent?
  - 5) Why have you chosen this strategy?
- We would like you to design the “look” for a series of direct mail pieces, including an introductory or profile mailer and an issue piece. Please prepare the initial profile mailer and the issue piece as a storyboard display.

**Table: The Stand the Candidate Should Take on the Issues**

List Major Issues	List Community Groups in Favor	List Community Groups Opposed	Describe Candidate's Likely Stance Based on Biography	Describe Stand You Think Candidate Should Take to Win the Election

List Major Issues	List Community Groups in Favor	List Community Groups Opposed	Describe Candidate's Likely Stance Based on Biography	Describe Stand You Think Candidate Should Take to Win the Election

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## **J. T. Watts for County Board of Supervisors**

### **C A M P A I G N   H E A D Q U A R T E R S**

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FROM: Dario Martinez, Campaign Manager

TO: Media Team, LD Consulting, Inc.

RE: Governor's Attached Note

As you can see by the attached note, we have a real problem. According to our pollster, we can expect about a 5% decline in voter support once Johnston's hit piece is mailed and Watts' secret becomes public knowledge. This 5% loss in voter support could well cost us the election.

The good news is, we got this leaked to us. This gives us a chance to plan a counterattack before we get slammed by Johnston's hit piece.

What do you folks think we should do? Clearly, we don't have time, or the money, to print both the issue piece you are working on and a mailer defending against these revelations about Watts. Our finance advisor says we could do one flyer and a full-page newspaper ad. That's all we have money for. Of course, we could scrap the issue piece and do a hit piece about Johnston's questionable relationship with his child. He's less likely to try and create a media event out of our misfortune if he knows we can fight back. Remember, in the public's eye, not responding to Johnston's hit piece is a concession to it.

We can always send out a press release in addition to the mailer and the newspaper ad. The press release is essentially free. The problem with the press release is that we don't know if the press will use it, or if they will print exactly what we say. The important thing is, all of this has to be done by Friday before Johnston's hit piece is mailed.

I need a presentation from you on Thursday about your suggested mailer — whether it's the issue piece, a hit piece, or a counter to Johnston's hit piece. I also need an accompanying newspaper advertisement and/or press releases as you see fit. Whatever package you present, it must address the anticipated negative publicity plus let our constituents know that we are trying to keep this campaign focused on issues. Unfortunately, I can tell you from past experience, the public will pay less attention to issues when faced with an interesting scandal.



## FROM THE DESK OF GOVERNOR BROWN

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FROM: Governor Brown  
TO: Dario Martinez, LD Consulting, Inc.  
RE: Pending Hit Piece

Monday:

It seems J.T. is facing a serious problem in his campaign. I have gotten word via a printer who worked closely with my previous campaign manager that the Johnston campaign is preparing a hit piece that will be mailed this Friday. Their plan is to make sure the hit piece arrives in voters' mailboxes next Monday, giving your people little time before the election to prepare an adequate response.

I wanted to give you a heads-up on this so you can prepare your spin. Watts got caught growing large quantities of marijuana in the attic of his rented house while in law school. He did not serve jail time because there were some court technicalities about a search warrant. Police apparently entered the house without a search warrant when Watts was arrested. Although he went ahead and finished law school, he lost his right to practice law in the state. Johnston, as the former president of the police union and a long-time City Council member, has access to details of the case, complete with photographs taken of the marijuana plants in the attic and photos of Watts on the day he was arrested — all taken from police files, I presume.

I knew about this but, you know, it happened more than 10 years ago and in a local election like this, I didn't think his opponent would make an issue of it. Sorry to keep you in the dark about this unfortunate situation.

I can give you one glimmer of good news: Johnston had a child out of wedlock at age 16. Several years ago, the child came forth claiming Johnston was a deadbeat dad. There are people in your area who know this, but it's never been made "public knowledge." See what you can make of that.



**ANGELINA GONZALES FOR STATE ASSEMBLY**  
**C A M P A I G N   H E A D Q U A R T E R S**

FROM: Dario Martinez, Campaign Manager  
TO: Media Team, LD Consulting, Inc.  
RE: Governor's Attached Note

As you can see by the attached note, we have a real problem. According to our pollster, we can expect about a 5% decline in voter support once Billings' hit piece is mailed and Angelina's misfortune becomes public knowledge. This 5% loss in voter support could well cost us the election.

The good news is, we got this leaked to us. This gives us a chance to plan a counterattack before we get slammed by Billings' hit piece.

What do you folks think we should do? Clearly, we don't have time, or the money, to print both the issue piece you are working on and a mailer defending against these revelations about Angelina. Our finance advisor says we could do one mailer and a full-page newspaper ad. That's all we have money for. Of course, we could scrap the issue piece and do a hit piece about Billings' Libertarian past. He's less likely to try and create a media event out of our misfortune if he knows we can fight back. Remember, in the public's eye, not responding to Billings' hit piece is a concession to it.

We can always send out a press release in addition to the mailer and the newspaper ad. The press release is essentially free. The problem with the press release is that we don't know if the press will use it, or if they will print exactly what we say. The important thing is, all of this has to be done by Friday before Billings' hit piece is mailed.

I need a presentation from you on Thursday about your suggested mailer — whether it's the issue piece, a hit piece, or a counter to Billings' hit piece. I also need an accompanying newspaper advertisement and/or press releases as you see fit. Whatever package you present, it must address the anticipated negative publicity plus let our constituents know that we are trying to keep this campaign focused on issues. Unfortunately, I can tell you from past experience, the public will pay less attention to issues when faced with an interesting scandal.



## FROM THE DESK OF GOVERNOR BROWN

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FROM: Governor Brown  
To: Dario Martinez, LD Consulting, Inc.  
RE: Pending Hit Piece

Monday:

It seems Angelina is facing a serious problem in her campaign. I have gotten word via a printer who worked closely with my previous campaign manager that the Billings campaign is preparing a hit piece that will be mailed this Friday. Their plan is to make sure the hit piece arrives in voter's mailboxes next Monday, giving your people little time before the election to prepare an adequate response.

I wanted to give you a heads-up on this so you can prepare your spin. Angelina's husband has been having some financial difficulties and has taken funds from her campaign to shore up his business. In addition, as her campaign's treasurer and apparently without her knowledge, he took campaign contributions to meet personal expenses. I knew for some time the family business was in financial trouble, but I did not think it would impact the Assembly campaign.

I can give you one glimmer of good news: my staff unlocked an interesting bit of information about Mr. Billings. It seems he was a registered Libertarian through college and voted Libertarian for several years. Interesting from a man who claims in his campaign speeches to be a lifelong Republican... There are people in your area who know this, but it's never been made "public knowledge." See what you can make of that.

## **PRESS RELEASE**

### **What is a Press Release, and How Do Politicians Use a Press Release?**

A press release is an announcement given to the media (newspaper, radio, and television reporters) by government or business leaders, candidates, or elected officials. The press release contains information about an event, issue, or story that its writers hope will be covered in the news reports.

There are two kinds of press releases used in campaigning. The first is usually called a “press advisory,” and it is used to get the media to attend an event. The press advisory provides the “who, what, where, when, and why” of the event. The first paragraph infers what the “why” will be about and suggests the reporter will learn more when he or she attends. It is a “pre-release” used to pique interest or keep the media in tow. Some information will be held back until the event to make sure the press attends. The beginning paragraph may be the only part of the press release reporters will read, so it should entice them to attend the event. In subsequent paragraphs, in descending order of importance, should be the supportive facts and supplemental information.

The second type of press release is the more standard and inclusive story. This release should be written like a self-serving newspaper story, and it must have a quote from the candidate. The best possible scenario is having a reporter quote your release rather than actually probing the candidate for comment. While smaller media organizations may actually run the whole release close to verbatim, major media outlets will rarely use your canned quote. But, it does frame the heart of the story from your candidate’s perspective, and it may help keep your candidate on message.

The media, especially television and radio, seek news that is fresh and out of the ordinary. In the first instance, if a public leader makes a statement that is similar or the same as statements he or she has made in the past, the information is not likely to be reported because it is not new. The statement may provide important information to the public, but it will not attract attention in the same way that a radical departure from past statements would make people take notice. Second, the media report stories that are out of the ordinary, exciting, provocative, or unusual rather than important. As an example, if the mayor gives a speech about a new traffic plan for the downtown area and falls off the stage while giving his speech, the media will give much more air time to the mayor falling off the stage than to the new traffic plan, even though the traffic plan may have serious consequences for the businesses and citizens of the city.

Given the tendency of the press to report what is fresh and what is out of the ordinary, the press release must appeal to these preferences or it will be ignored. Place the elements of “what is new” and “what is out of the ordinary” at the very beginning of the press release.

The press release is also an opportunity for the writer to put a particular spin or interpretation on the event being reported. A candidate uses the press release to convince the press, and ultimately the public, to believe and support his or her position. The “spin” should be consistent and evident throughout the press release.

Press releases allow the campaign to inform reporters as to the candidate’s whereabouts; they can provide quick, universal responses to hits; and they can offer reporters ideas about stories to pursue. They will not serve as stories in and of themselves. No news agency is going to tell the story exactly as it is contained in the press release.

**Here are some other rules for writing a press release:**

- At the top of the release, include the name and phone number of a contact person.
- Start the release with the city and release date. It is very important to include the date so that reporters know how old your story is. Reporters read dozens of faxed and mailed press releases every day, and sometimes they go through them quickly. The date will make it clear that yours is a new, “hot,” or immediate issue.
- Keep the heading (title) short. (Reporters won’t use it, but it should grab their attention.)
- Keep it simple. Do not use acronyms and long, difficult words.
- Keep the press release to one page, and end with three pound signs (###).

A press release before, during, and after the impact of an opponent’s hit piece can be used, but it will not replace a direct mail piece responding to the opponent’s charges. The press release can provide free news coverage and can help frame your candidate’s side of the argument. However, the press release is not going to take much of the sting out of the attack. There is also no guarantee the press release will even be used or noticed by the press. And worst of all, the press release can lead reporters to negative stories your candidate doesn’t want told.

Once the media team and the press secretary are satisfied with a press release it is “blast-faxed” to media organizations. Because the release is faxed it is best to keep it to one page, single-spaced.

(SAMPLE)

## FOR IMMEDIATE RELEASE

October 22, 2004

Contact: P.J. Johnston, 415/555-1234

### **GOVERNOR TAPS GONZALES FOR CAMPAIGN FINANCE REFORM TEAM**

#### **Tireless Advocate for Fair Elections to Help Revamp Campaign Laws**

**SACRAMENTO** — Gov. Brown today announced the selection of Angelina Gonzales to serve on the prestigious statewide Governor’s Committee to Investigate Campaign Finance Reform.

Gonzales, a public interest attorney and candidate for the State Assembly, is a well-respected and published advocate for campaign finance reform. She has served on a non-partisan task force reviewing state law and contributed to a comprehensive report on the effects of campaign costs on voter turnout.

“Angelina Gonzales is one of the state’s most committed champions of campaign finance reform,” Gov. Brown said. “She won’t stop until we manage to get a handle on out-of-control campaign spending. I look forward to the day she brings her passion and expertise to the state legislature.”

The governor has directed the Committee to Investigate Campaign Finance Reform to canvas the state, garner feedback from citizens, investigate potential solutions, and suggest ways the state can reform its current campaign finance laws.

At a press conference with the governor today, Gonzales left no doubt that she’s up to the task.

“I’m deeply concerned about the role of money in politics,” Gonzales said. “That’s what inspired me to get involved in the first place, and that’s why I’m running for office. There’s simply too much money in politics today, and I intend to do something about it.”

Gonzales thanked Gov. Brown for the opportunity and credited him for taking a critical first step in addressing the public’s demand for reform.

**Angelina Gonzales, an attorney and public policy advocate, is a candidate for the State Assembly. She has served as a member and past president of the City Council and as a member of the Unified School District Board of Trustees.**

###



## **Appendix II:**

# **Lesson Materials**

## CAMPAIGN MANAGEMENT

An electoral campaign is an organized effort to persuade voters to select a certain candidate from among or between competing candidates.

The size and complexity of the campaign depends upon the office (governor, mayor, City Council, Congress), the size of the district or state, and the existence of a credible opponent. The more important the office, the larger the district, and the more credible the opponent, the more money will likely be spent on the campaign. The more money spent on the campaign, the more likely job descriptions and job tasks will be specific and campaign workers will be employees rather than volunteers. In general, campaigns need: 1) money, 2) media attention, and 3) a cadre of support. The campaign strategy is the way candidates manipulate these three elements in order to win votes. Campaigns deal in image, information, and candidate/public contact. They require attention to, and expertise in, the following tasks:

- 1) Staffing and structuring the campaign
- 2) Researching district issues, voters, and opposition candidates
- 3) Developing a campaign plan
- 4) Developing the message, image, and presentation of the campaign
- 5) Voter contact
- 6) Using paid and free media
- 7) Fundraising and budgeting

### 1) Staffing and structuring the campaign

In small campaigns volunteers do much of the work. In major campaigns paid experts, whose skills may be highly specific, do this work. Generally, a campaign staff will include:

- **Campaign Manager** – Directs and administers the campaign; manages the message and direction of the campaign. The campaign manager and his/her staff help write speeches, schedule appearances, plan strategy, and recruit supporters.
- **Fundraiser** – Responsible for raising money to operate the campaign and for monitoring and auditing the sources of funding.
- **Treasurer** – Can be the same person as the fundraiser; oversees the use and auditing of campaign funds. In California, every campaign is required by law to disclose the name of the treasurer on campaign material.
- **Campaign Counsel** – Provides expertise on campaign law, especially finance and fundraising.
- **Media Consultant** – Plans advertisements, buttons, stickers, direct mail, and give-aways, and helps spin the issues. Media consultants and the press secretary plan and implement the “message,” keeping in mind that these two staffers may often be at cross-purposes.
- **Research and Policy Advisor** – Researches the issues of the district and advises the candidate on policy; is involved in devising the spin on issues and events surrounding the campaign.
- **Pollster** – Generally a hired firm that provides opinion research and gives candidates feedback on how they are viewed, what their chances are for winning the election, what voters want, and where their support is strong or weak.
- **Press Secretary** – Works with the media to get favorable information about the candidate into the daily news, attracts attention for the candidate, and deflects negative press. The press secretary and media consultants plan and implement “message.”

- **Field Director** – Field campaigning (often described as “grassroots”) is the heart of campaigning and comes under the aegis of the field director, who oversees contact with neighborhood organizations, unions, and clubs and the coordination of volunteers. Also canvasses local organizations for endorsements, gathers signatures, sets up phone trees, and provides office support for the headquarters.

## 2) Researching district issues, voters, and opposition candidates

Campaigns must begin with thorough research about:

- Voter demographics and voter history
- Critical issues and voters’ opinions on these issues
- The opponent or opponents in the campaign
- The candidate and, to some degree, the candidate’s staff and associates
- Financial sources for campaigning
- Potential media resources, both paid and free
- Organizations and individuals that may provide support or endorsements
- Potential donated resources, like office space or plane travel
- Legal requirements

Some of this research is done using public opinion polls. Polls are a collection of individual attitudes and beliefs on issues gathered by polling experts, who try to measure opinion by asking a small sample of a group for their opinion and then extrapolating the results to the whole group. In a campaign, polls are used at various points:

- **Benchmark polls** are used at the beginning of a campaign to determine such basic information as how well the candidate is known, what issues people associate with the candidate, what people think of the opponent, and what issues people are concerned about. A benchmark poll can help the campaign staff design its campaign strategy.
- **Tracking polls** follow changes in attitudes toward candidates or issues by conducting daily sets of interviews. These interviews generally sample a small number of people and do not provide reliable generalizations. However, averaged over time, tracking polls can show trends or changes in attitudes. Tracking polls are used by well-funded, major campaigns like governor’s races or Senate races. The campaign staff uses tracking polls to guide and revise its strategies.
- **Exit polls** are conducted in person at voting stations. They are short questionnaires given to a sample of voters after they have voted. Exit polls help the media predict the winner in a race, and they provide the reasons behind voter choices.
- **Push polls** are really unscrupulous, negative campaigning masquerading as polls. Pollsters will ask leading questions based upon inaccurate information as a means of spreading doubt about an opponent. As an example, a push poll conducted by the Aldo Billings staff might ask prospective supporters of Angelina Gonzales, “Would you likely support or not support Angelina Gonzales if you knew she planned to provide free public transportation for all government workers once she is elected?” Even though Gonzales has no such plans and no power to implement such a program, such an unsubstantiated suggestion will raise doubts in the minds of her supporters.

**On the Campaign Trail** limits research on issues and voter demographics to expedite the unit. However, in actual campaigns a good deal of initial staffing and funding goes into research to prepare the campaign plan and its central theme and message. As this unit demonstrates, research



about one's own candidate is a critical part of campaigning. A candidate's opponent will learn his or her weaknesses and attack them, so it is imperative that the campaign staff is prepared. Campaign staff need to know in advance the pitfalls they may face and the potential negative campaigning they may encounter later in the campaign. Information early-on gives staffers an opportunity to consider (and practice) the spin they will put on the negative features of their candidate.

### **3) Developing a campaign plan**

A campaign plan provides the structure for deploying limited time and financial resources. This is the campaign's plan of attack that will be followed by the candidate and staff. It spells out the goals and overall strategy of the campaign, and includes staffing, time lines, scheduling, fundraising, budget, and media strategies. Some campaigns prepare a written campaign plan that is made available in edited form to the public. The plan answers the general questions:

- What are our goals in this campaign?
- What is our strategy for reaching our goals?
- What will it cost to reach our goals?
- How will we budget campaign funds?
- What is our time line for reaching our goals?
- How will we schedule our candidate's time in order to reach our goals?

The planning process allows candidates to reflect upon the ways in which money will be raised and spent, and on the means the candidate is willing to use in order to get elected. Will the candidate accept funds from locally unpopular interest groups or political action committees (PACs)? Will the candidate participate in debates? Will the candidate divulge personal information? These are all questions the candidate answers in the planning process.

### **4) Developing the message, image, and presentation of the campaign**

In order to get elected, candidates need to send the right message to the right audience using the most time- and money-efficient medium possible. The candidate needs a clear and concise message that is repeated often. This message should resonate with the voters and hit upon a chord that voters can get passionate about. The message needs to be consistent, easy to articulate, and repeated often.

Candidates also need an image. Voters are likely to support a candidate who creates an emotional link with the public, even if they don't agree with all of the candidate's political beliefs and goals. John Kennedy made Americans feel as if they all had sophisticated backgrounds, Boston accents, Ivy League educations, and vision. The public enjoyed, by association, that image of America.

The most rudimentary stage of creating an image requires the candidate and staff to develop campaign literature that repeats the candidate's name and the office he/she is running for. Name/face recognition with the office is paramount to getting elected. Direct mail, radio and television advertisements, lawn signs, newspaper advertisements, and canvassing are all strategies used to promote name/face recognition.

In developing the message and presentation of the campaign, candidates and their staff must reflect on the proportion of negative to positive campaigning. Candidates and their staff must decide how much of their resources they will devote to:

- Convincing voters of the good their candidate can do (positive campaigning)
- Convincing voters of the harm their opponent(s) can do (negative campaigning)

Presentation also requires attention to the subtle visual messages. Such details as whether to wear a suit or casual clothes to certain gatherings, to use expensive bond paper for direct mail pieces, or to use demonstrative body language during a debate can have a major effect on the candidate's image. These factors are dependent upon the demographics of the community, and should be considered when planning direct mail, advertisements, and candidate/voter contact.

## 5) Voter contact

One major task of a campaign staff is to ascertain who the voters are, their demographics, their major concerns, and their opinions about the issues. Campaign literature and candidate appearances are then designed and delivered to specific voters according to this information. This process is called targeting, and it helps candidates put their resources where they are likely to have the most impact. Triage is used in targeting. That is, resources are not used on those who would vote for the candidate no matter what, nor are they used on voters who under no circumstances would be persuaded to support the candidate. Rather, resources are directed toward voters who are undecided and could be persuaded to vote for the candidate.

Targeting information to specific demographic or geographical groups is a technologically sophisticated process. Candidates select an issue (abortion, homelessness, healthcare) and send a mailer about the issue to those who are concerned about it and will likely agree with the candidate's stand. To some degree, candidates guess about agreement but can be more scientific about it by buying mail lists (including ones that contain voters who have supported similar candidates or causes), using precinct lists and past election returns, or phone and/or door-to-door canvassing of the area prior to sending the mailer.

The candidate has six major ways to contact potential supporters:

- 1) **Face-to-face** – Candidates speak to groups of workers, union members, church members, social groups, parents, and college students, and go door-to-door or meet and greet people in a shopping mall or office complex.
- 2) **Telephone** – Generally campaigns purchase phone banks and use paid professionals or volunteers to make persuasive appeals for the candidate, or to encourage the candidate's core supporters to vote.
- 3) **Free media** – Candidates attempt to get press releases or appearances aired or in print.
- 4) **Paid media** – Radio, television, and newspaper ads or billboards are used in target areas.
- 5) **Direct mail** – Targeted to specific groups of voters, direct mail includes introductory pieces and endorsements (profile mailers), negative campaign pieces (hit pieces), issue pieces, and "slate cards" like those sent out by unions or party organizations.
- 6) **Internet** – Campaigns are coming to rely upon web sites to promote their candidate and make personal contact with voters. Most candidates have a web site, and they use it to promote their stands on issues, publicize their accomplishments, and answer voters' questions.

## 6) Using paid and free media

In many ways, campaigns are organized around paid and free media attention. Events and activities for the candidate are scheduled with an eye to attracting media attention. Media coverage is expensive so candidates try to attract as much free media as they can. It is the job of the campaign manager, the press secretary, and the media staff to maximize free exposure for the candidate. The campaign staff will supply the media with the candidate's daily schedule, advance copies of speeches, and access to prepared statements (press releases).

Free media include:

- Radio and television news spots
- Newspaper coverage
- Press releases
- E-mail and some web sites

Candidates depend upon this coverage for their major speeches, debates, and rallies. These events are designed to attract as much free attention as possible and are often called “media events.” Many of them are pseudo in nature and designed solely to attract television, radio, and press coverage. Often they are staged. A candidate with a strong environmental message may meet the press at a local dumpsite or a badly polluted river. Candidates concerned about the physical deterioration of local schools will tour a school site and invite the press. The intent is to draw attention to the candidate and either to the problem that needs addressing or the accomplishments of the candidate. Other events, like debates, are planned but not staged. They can, to some degree, be scripted, but candidates are expected to answer impromptu questions from the press.

The media, for their part, know that conflict and scandal will attract the greatest number of readers and viewers. This encourages negative campaigning and, therefore, free media coverage among candidates.

Larger statewide or national campaigns also take advantage of radio call-in shows, television “magazine” programs, televised town meetings, late-night entertainment programs, and interview shows like “Larry King Live” to get free exposure. For any race below governor, newspapers are the most crucial form of free media.

Candidates cannot rely on free media to get the message out exactly the way they want it told to voters. They must depend upon paid advertising to “script” the story and present themselves in the most positive light.

Paid media include:

- Radio and television advertisements
- Direct mail
- Give-away items like pencils or pot holders
- Billboard advertisements
- Internet web sites
- Video news releases

Television advertising is expensive. A 30-second spot can cost more than \$5,000 in large media markets (big cities), and production costs can be as high as \$35,000 for that 30-second spot. Some local cable channels run paid advertisements, which helps smaller, local campaigns. Major channels have media markets that are much larger than a local election district, so advertisements on these channels reach audiences that will not vote in the district election. Cable channels have smaller media markets and will reach just those affected by the campaign. Furthermore, cable channels charge less for advertising than the larger network stations. Candidates still must weigh the cost of advertising production and exposure on cable channels against the cost of radio, direct mail, and newspaper advertising, which can often reach a broader audience for less expense.

One of the newer forms of paid media access is the video news release (VNR). The VNR is an interview in the form of a news report, paid for by the campaign and aired at the candidate’s expense on local television. The candidate allows local reporters to participate in the interview by posing questions. VNRs are generally used in campaigns that are trying to reach a broad market.

## 7) Fundraising and budgeting

From 1964 to 1996, campaign costs rose from about \$200 million to over \$4 billion a year for all elections. The total cost for all Senate and House of Representatives races in 2000 was a little over \$1 billion. Perhaps the most dramatic example of campaign spending was the New Jersey Senate race in 2000, where Jon Corzine spent more than \$33 million in the Democratic primary alone. Senate races now cost about \$5 million, and a House of Representatives race can run from \$1 million to \$3 million. Local and state-level races are generally not this expensive. A race for the State Assembly generally costs between \$25,000 and \$500,000. Occasionally, these races can cost as much as \$1 million.

What do candidates do with the money? Most dollars spent in campaigning go to staffing and media attention. In presidential and congressional races, about 70% to 80% of the money goes to television advertisements alone. In general, campaign funds are used in the following manner:

- **Travel costs for statewide or national appearances.** Candidates jet from appearance to appearance, using personalized buses or rented planes. Candidates and staff members stay in hotels and eat meals while “on the campaign trail.”
- **Direct mail.** Mailings are used to introduce the candidate, solicit funds, explain the candidate’s stand on issues, or criticize an opponent.
- **Advertising.** Television, newspaper, and radio ads contribute to the multimillion-dollar advertising budgets of most national candidates. Local candidates generally rely on newspaper and radio ads, with some local television spots.
- **Fundraising parties.** It takes money to make money, and most candidates raise money by throwing gala parties, meet-the-candidate nights, neighborhood barbeques, or big-city gatherings in hotel ballrooms. A small gathering that costs about \$2,500 will net as much as \$25,000 in contributions, while a top-of-the-line party costing \$60,000 can easily raise \$1 million.
- **Office supplies and technology equipment.** Computers, networks, web sites, office furniture, phone banks, and campaign software are costly items but contribute to the efficiency of the campaign.
- **Polls.** Polls are an invaluable tool for “need sensing” the voters and profiling the public’s mood. These tools help candidates to prioritize public concerns and determine their stand on the issues. Polls are also used to track how the candidate is doing, so campaigns can tailor the message to either positive or negative trends. Polls are expensive, however. A poll of about 500 people can cost \$15,000.
- **Staff salaries.** Top-flight campaign staffers are expensive. These political campaign professionals, especially if they have a winning record in past campaigns, can cost as much as \$20,000 per month.
- **Consultants.** Campaigns use outside specialists, like LD Consulting, Inc. — the fictitious group in this unit — to provide expertise that would be too costly to employ on staff. These consultants can range from spin experts to web designers, and can charge as much as \$250,000 a campaign.

Fundraising is a labor-intensive proposition for most political officeseekers. This is especially true for candidates who do not have a proven track record in politics. The candidates in this unit are all neophytes — none of them are incumbents — so the time spent fundraising would be about the same for each candidate. In a real campaign, the candidates would spend, on average, more time raising money than would incumbents with a good track record in their district. Some candidates and officeholders spread fundraising over months and years and, therefore, spend little time in any given day on fundraising. For the most part, candidates spend the months before an election getting their message and record out to voters. They will hold several fundraising events spaced out over a

year rather than use valuable pre-election time solely to raise money. In this case, fundraising is more concentrated into events, and there will be aggressive fundraising activity around these specific events. Even if candidates do not need to spend a lot of *time* raising money, they need to be good at it. They need to have good connections with PACs, “checkbook” party members, lobbyists, business leaders, and party officials. We asked several congressional candidates to give us examples of an “average day” to illustrate the amount of time spent fundraising. An average day for a candidate may include phone calls to potential donors, meetings and meals with particular donor groups, and staff strategy sessions to plan fundraising efforts. Here is a composite example:

### **Congressional Candidate**

- 7:30 a.m. to 9:00 a.m. – Drive time to district’s major newspaper offices
- 9:00 a.m. to 10:00 a.m. – Newspaper editorial board meeting
- 10:00 a.m. to 11:00 a.m. – Drive time to constituent meeting
- 11:00 a.m. to 12:30 p.m. – Meeting with constituents
- 12:30 p.m. to 1:00 p.m. – Drive time to lunch meeting
- 1:00 p.m. to 2:00 p.m. – Business network lunch (fundraising activity)
- 2:00 p.m. to 2:30 p.m. – Drive time to campaign headquarters
- 2:30 p.m. to 6:00 p.m. – Debate prep
- 6:00 p.m. to 7:00 p.m. – Drive time to local community college
- 7:00 p.m. to 8:00 p.m. – Debate at community college
- 8:00 p.m. to 9:30 p.m. – Dinner with staff (includes fundraising strategizing)
- 9:30 p.m. to 10:00 p.m. – Drive time home

### **Campaigns in the United States**

The United States is a nation of constant campaigns and elections. Every year there is a major statewide election held somewhere, plus a major national election every two years and primaries for party nomination that precede the general elections. As an example, in California we have elections for:

- President every four years
- Governor every four years
- Senate every two or four years (two senators with staggered six-year terms)
- Congress every two years
- State Senate every four years
- State Assembly every two years
- Special Districts usually every four years
- County and City offices vary, but generally every two or four years

In the United States, we also have more elected officials than most democracies. There are about 500,000 elected positions, or jobs, filled by people who must run for office. Even if only two people run in a campaign, that means about one million people run for office regularly.

Another characteristic of American campaigning is variety. There are campaigns for:

- State ballot initiatives
- Propositions
- Bond issues (raising money for specific projects)
- Recall elections (to depose a seated politician)

- Local ballot initiatives
- Nomination or party primaries (candidates run within their party)
- General elections (candidates from different parties run against each other)

Voter turnout records illustrate the ballot fatigue experienced in this country. Voter turnout has declined since the 1960s, when 63% of eligible voters voted in the Kennedy-Nixon race. In the 2000 presidential race, only 51% of eligible voters voted.

Americans are bored by or ignore the never-ending campaigns, but they do not necessarily support the alternative of fewer campaigns and longer terms in office. Americans want control of their politicians, and they want their leaders to be vulnerable to the voter. Because politicians come up for election so often, they devote more time to meeting the public, and while in office, they consider the needs and wants of the voters. Americans like politicians to serve as agents of the people and to be responsive to and representative of the governed. Unfortunately, constant campaigning also means that politicians are always running for office, need to raise money, and can't take unpopular stands that may be in the best interest of the nation.

### **For more information on campaign management, see:**

The National Women's Political Caucus web site at:  
<http://www.nwpc.org>

The California affiliate of NWPC holds training programs throughout California to provide women with the skills needed to run winning campaigns. "These day-long workshops focus on the essentials of fundraising, media, and campaign management, as well as message development and get-out-the-vote strategies." NWPC also publishes *Campaigning to Win: The NWPC Guide to Running a Winning Campaign*.

*Campaigns & Elections: The Magazine for People in Politics* published by Congressional Quarterly Press. The magazine reviews campaign strategies, evaluates the effectiveness of mailers and television advertising, and offers critiques of specific campaigns. Articles also cover costs associated with using different campaign tools. Information can be found at:  
<http://www.cq.com> and  
<http://www.campaignline.com>

### **For more information about polls, see:**

Herbert Asher's *Polling and the Public: What Every Citizen Should Know*, published by the Congressional Quarterly Press (1995)

The Gallup Organization at:  
<http://www.gallup.com>

The New York Times/CBS News Polls at:  
<http://www.nytimes.com/library/politics/newspoll.html>

The Pew Research Center at:  
<http://www.people-press.org>

Los Angeles Times Poll at:  
<http://www.latimes.com/HOME/NEWS/POLLS>



## CAMPAIGN FINANCE REFORM

### For more information on campaign finance reform, see:

The Electronic Policy Network reports policy-related news from its 100-member organization and maintains updates on its web site about campaign reform. Currently, the web site has a listing of bills before Congress regarding campaign reform and information about PACs, soft money, and campaign disclosure laws.

<http://www.epn.org>

The Alliance for Democracy is a “progressive populist movement” advocating public funding of all federal elections. It has initiated a “Clean Elections Campaign” to support public funding of campaigns.

<http://www.thealliancefordemocracy.org>

For information about the Clean Elections Campaign in Northern California, contact the Alliance for Clean Elections, 415-482-8275.

The Public Campaign advocates clean money campaign reform. Its web site includes a review of campaign financing, its problems, and suggested legislative solutions, and explains how clean money campaign reform works.

<http://www.publiccampaign.org>

New Rules tracks innovative public policy in a variety of sectors (finance, governance, retail, taxes). Its governance section describes clean election laws and reviews campaign reform in Arizona, Maine, Massachusetts, and Vermont.

<http://newrules.org>

### Two informational videos on campaigning and campaign reform are:

“Politics in Action,” 1995, Addison Wesley Longman, Inc. includes a campaign case study and coverage of commercials, debates, and the electoral college. Available from:

[www.awlonline.com](http://www.awlonline.com)

“Clean Campaigns,” with Bill Moyers, documents the effects of clean campaign laws in New Hampshire and Arizona. It is available through The Public Campaign, 202-293-0222.



## WHO VOTES?

Although every citizen in the United States aged 18 or older is eligible to vote (except those imprisoned), most Americans do not vote. Voter turnout is dependent upon age, employment, education, income, and race.

- **Age:** The typical voter is older than 35. Only 31.2% of eligible voters under age 21 actually vote. The percent of voters rises steadily with age, reaching a maximum with the 65-and-older age group. In the 2000 presidential election, voting by age looked like this:

18-20	=	31%
21-24	=	33%
25-34	=	43%
35-44	=	55%
45-64	=	70%
65+	=	71%

- **Employment, Education, Income:** The likelihood of voting increases as one moves up the socioeconomic ladder. About 70% of voters with family incomes over \$40,000 vote regularly. Voting steadily declines as income declines. Among the poorest Americans, fewer than 50% vote regularly. Education has a similar effect on voting. Seventy-three percent of those who have completed college vote, while 60% with at least one year of college report voting regularly, and 49% of those who attended high school but not college vote regularly. Of those with an eighth grade education or less, only 28% vote. About 55% of employed citizens vote, while only 37% of unemployed citizens vote. About 54% of the people not in the labor force (including retired citizens) vote regularly.
- **Race:** When blacks and whites with similar family incomes are compared, their reported voting turnout rates are roughly comparable. Hispanics, however, tend to have lower turnout rates even with similar family incomes. About 56% of whites report voting regularly, 51% of blacks, and 27% of Hispanics. This disparity is almost completely explained by the differences in income and education between whites and other racial and ethnic groups.

## CAMPAIGN SLOGANS AND THEMES

### What are slogans?

Slogans are one-line quips that can be easily remembered and are directly associated with a candidate or in some way describe a candidate. Examples of famous slogans from past campaigns include:

- “Tippecanoe and Tyler Too” – Used in the 1840 presidential campaign by General William Henry Harrison, recalling his military victory over the Shawnee at Tippecanoe Creek in 1811.
- “He Kept Us Out of War” – The slogan of Woodrow Wilson, who during his first term as president kept the United States out of World War I.
- “I Like Ike” – For Dwight Eisenhower’s 1952 campaign, in which he capitalized on his popularity as a World War II military hero.
- “Compassionate Conservative” – Used by George W. Bush in the 2000 campaign.
- “The Real Deal” – Used by John Kerry during the 2004 campaign.

### What are recurring themes candidates use about their campaign?

Themes differ from slogans in that they are associated with issues, or the general focus of the campaign, rather than directly relating to the candidate. Examples of recurring themes from past campaigns include:

- “A New Deal” – Perhaps one of the most famous themes. In the 1932 campaign during the darkest days of the Depression, the Democrats under the leadership of Franklin Roosevelt used it to bring hope to the American people.
- “Morning in America” – Used by Republican Ronald Reagan in the 1980 campaign to strike an optimistic note amidst the malaise of the energy crisis, Iranian hostage standoff, and the Cold War.
- “Steady Leadership in Times of Change” – The 2004 theme for the Republican presidential race.
- “Making America Energy Independent” – One of the themes used by the Democrats in the 2004 campaign.

### What are recurring themes candidates use about their opponents?

These themes are generally negative and short and are often aimed directly at the opposing candidate. Negative themes that catch on can be toxic to a campaign. That is, if the candidate does not respond to the charge, it gives credence to the theme; if the candidate does respond, he or she appears defensive. Either way, these themes become labels that are nearly impossible to shake.

- “The Aristocrat in the Palace” – Used by General William Henry Harrison in his 1840 campaign against President Martin Van Buren. Harrison portrayed himself as an ordinary farmer (he was actually from a wealthy plantation family) and cast President Van Buren as a somber elitist divorced from the people.
- “Henry Wallace and His Communists” – An often-repeated theme used by Harry Truman in the 1948 campaign against Henry Wallace of the Progressive Party.
- “Egg-Head” – Used by the Dwight Eisenhower campaigns in 1952 and 1956 to describe the bookish, somewhat aloof Adlai Stevenson.
- “Flip Flop” – An often-repeated theme used by the Republicans in 2004 to describe Senator John Kerry’s voting record.

## WHY USE DIRECT MAIL?

Direct mail is an important way to communicate with voters, for several reasons:

- 1) Direct mail has advantages over television and radio.
  - It is cheaper than television or radio.
  - It is not tied to a media market. Television and radio audiences may not include the district's entire constituency, or may include more than the district's constituency so candidates pay for advertisements heard by people who cannot vote for them.
- 2) Direct mail can send a particular message to a specific group, and can target specific districts, precincts, or demographics.
- 3) It leaves a lasting visual impression.
- 4) It can get much rougher in tone and message than a television or radio advertisement.
- 5) It can get more in-depth on issues, especially in an issue piece.

## WHAT KIND OF INFORMATION IS NEEDED TO PLAN A STRATEGY FOR DIRECT MAIL?

- 1) Demographic Information
  - Number of registered voters and their party by precinct
  - Ethnic groups, religious groups, age of voters, economic status, education level, type of employment and professions
  - Family status — Configuration of families, school-aged children, gay enclaves, singles groups, retirement communities
- 2) Issues and opinions
  - Issues of primary concern in the district — environment, war, transportation, taxes, etc.
  - Variety of opinions and how strong opinions are
  - Number of voters for and against issues

## HOW DO CAMPAIGNS GATHER THIS INFORMATION?

- 1) Make direct calls to constituents (polls)
- 2) Buy a copy of the Federal Elections Report
- 3) Buy lists from political list brokers
- 4) Request registered voter information from the County Clerk

## CHARACTERISTICS OF A PROFILE MAILER

Profile mailers are slick and casual, and reflect the image and tone of the campaign. Full-size, color copies of profile mailers are available at [www.bie.org](http://www.bie.org). In reviewing these pieces with students, stress that:

- 1) Profile mailers reinforce name/face recognition. The candidate's name and face should be repeated often, or should be central to the piece.
- 2) Color, paper weight, style of print, and placement of information on the page are critical to capturing the attention of the viewer. (In the examples shown on the BIE web site, ask students which ones they find appealing and why. As an example, what makes one photo effective and another one not effective?)
- 3) Marketing experts assume that fewer than half of the people who pick up a mailer will actually open it, so it is important to make the first page engaging. Fewer than 10% of the people who open the mailer will actually read it, so words should be kept to a minimum and speak directly to the voters being targeted.
- 4) Profile mailers should include:
  - The name and face of the candidate
  - A slogan or catch phrase
  - Photos of the candidate with his/her family or other people's families
  - Photos of the candidate in action — playing soccer or baseball with children or his/her family, visiting a construction site, talking with business leaders
  - Photos of the candidate with various ethnic groups
- 5) Profile mailers can also include (if not cluttered):
  - Positive images of the candidate with representatives from target voter groups (elderly, young families, children)
  - Testimonials from representatives of target voter groups
  - Endorsements
  - A brief review of the candidate's accomplishments or qualifications

## CHARACTERISTICS OF AN ISSUE PIECE OR ISSUE MAGAZINE

The issue piece breaks all the rules about glib, straightforward language and plentiful white space. It is a narrative review of the candidate's stand on issues deemed important to the race or the district. It is an in-depth look at the candidate's philosophy, generally organized by topic of interest as identified in the polls. In reviewing the issue pieces provided at [www.bie.org](http://www.bie.org), stress that:

- 1)** No campaign media expert actually expects voters to read a 40- to 60-page issue piece. In fact, they are not likely to read a four-to-five page issue piece. They may read headlines and callout phrases or sidebars, so these need to be catchy and raise central points that make the candidate look good.
- 2)** Issue pieces are expected to show how busy, committed, involved, competent, and informed the candidate is. This impression can be given by actual content and by the sheer volume of content.
- 3)** The issue piece is serious in tone.
- 4)** An issue piece must include information that is carefully weighted to appeal to the target audience. It would not be wise to send an issue piece advocating increased taxes to pay for schools to an elderly population that is worried about taxes and beyond the immediate benefit of public schools.
- 5)** Information can be presented in a magazine format rather than a flyer.
- 6)** Issue pieces often follow a question-and-answer format.

## CHARACTERISTICS OF A HIT PIECE

A hit piece is the quintessential form of negative campaigning. In reviewing the three hit pieces provided at [www.bie.org](http://www.bie.org), stress with students that:

- 1) In the hit piece, the candidate uses slanted language, innuendoes, and if possible, factual negative information to erode the opponent's image and thus voter support.
- 2) Hit pieces use stark or sharp colors, catchy phrases, and minimal verbiage. In reviewing the three hit piece examples on the BIE web site, ask students to consider the wording, the nature of the accusations, color schemes, and photos in determining the impression given of the opponent.
- 3) If photos are used of the candidate, these will generally be muted, in soft colors or soft tones — in contrast to the unattractive, sharp-toned photos of the opponent.
- 4) Generally, hit pieces want to divorce the candidate sending out the hit piece from the bad news being given about the opponent. The name of the candidate may only appear in small print. This practice of playing down the role of the sender is especially true in places where negative campaigning has been known to cause a backlash.
- 5) Federal law requires that all campaign literature print the source of the piece. It is illegal for a candidate to send out an anonymous hit piece.
- 6) It is also illegal to send out hit pieces after a certain deadline prior to the election. (In California all literature must be mailed no later than 48 hours before the polls close.) Candidates want to get as close to this deadline as possible, so the opponent cannot react effectively.
- 7) An unanswered hit piece is seen as a concession.

For further information about negative campaigning and examples of media use, see:

[http://www.uiowa.edu/~commstud/resources/pol\\_ads.html](http://www.uiowa.edu/~commstud/resources/pol_ads.html) and

[http://www.pbs.org/30secondcandidate/tricks\\_of\\_the\\_trade/](http://www.pbs.org/30secondcandidate/tricks_of_the_trade/)



## **Appendix III:**

# **Teacher Key**



**TEACHER KEY****Table: The Stand the Candidate Should Take on the Issues**

The following is an example of a completed version of the table that students are expected to fill out. Remember, this is only one example. The table can be completed in many different ways. This example can be used to prompt students during this exercise, but it should not be given to students to copy. This example is based upon the Angelina Gonzales campaign.

List Major Issues	List Community Groups in Favor	List Community Groups Opposed	Describe Candidate's Likely Stance Based on Biography	Describe Stand You Think Candidate Should Take to Win the Election
<b>Raising taxes</b>	None, most people in the district want lower taxes	The elderly The working class The middle class	She supports access to quality public education and raising taxes to support it.	She can support better public services, like schools, but not by raising taxes.
<b>Increase funding for education</b>	Young families	The elderly	She supports access to quality public education, although she attended private schools. She served on the school board and has young children, so education is probably a priority.	The elderly control local political decisions and they see no gain in supporting higher taxes for public education. Angelina must talk about improving test scores and school performance and not about spending tax money to repair deteriorating school buildings.
<b>Social services</b>	The elderly want such things as police protection and affordable health care, while young families want better schools, recreational facilities, and help for those who lose their jobs	Most people would rather have services cut than taxes raised, but they disagree on what services to cut.	She is running for office to enact her vision of government involvement in social reform and believes the government should protect the elderly, the poor, children, and those unable to care for themselves.	To stay loyal to her vision but not alienate most of the voters, she must focus on improving social services for everyone through greater efficiency rather than tax increases.

**TEACHER KEY**

List Major Issues	List Community Groups in Favor	List Community Groups Opposed	Describe Candidate's Likely Stance Based on Biography	Describe Stand You Think Candidate Should Take to Win the Election
<b>Campaign reform</b>	Everyone	None	Angelina served on the statewide Governor's Committee to Investigate Campaign Finance Reform. She is likely to be knowledgeable on the subject, but it is not clear if she supports campaign reform.	Since the community is sick of negative campaigning and the amount of money that funds local campaigns, she should frequently state that her campaign is focusing on issues—not slander or innuendo about her opponent—and that she expects her opponent to do likewise.
<b>Jobs</b>	The elderly want a readily available, inexpensive, semi-skilled workforce. Young families move here to find work in tourist and recreational facilities, technology firms, and elder-related services.	None	She supports the public services needed to improve the community's quality of life. She also wants to protect the natural environment and the community's small town flavor.	In promoting jobs in service industries for the elderly, she can explain to elderly voters the importance of quality education as a means of providing semiskilled and skilled workers for elder-related services.